

California Statewide Reference: A Design Proposal

Library of California Board Sacramento, California

“Bring to bear the willingness, capacity, and ability to continue to morph into ever-relevant, evidenced-based new iterations of service.”

Last Time...

- September 14, 2006
 - Project Background and Methodology
 - Outcome: Design a new model for statewide reference
 - Timeline: August 2006 – June 2007

Today...

- Proposal presentation and feedback
- Supplemental background handout
- Review project status and next steps

Tomorrow...

- From Web 1.0 to Web 2.0 and beyond
 - Web 1.0: email, websites, search engines, and surfing
 - Web 2.0: Interactivity, conversations, interpersonal networking, personalization, individualism
 - Web 3.0: more distributed in form, web services, the semantic web...who knows?
- Library 2.0
 - how to use the Web 2.0 opportunities in a library environment
- Librarian 2.0
 - Understands end users
 - Is where the user is, when the user is there

Librarian 2.0*

- Connect people and technology and information in context
- Connect users to expert discussions, communities of practice and participate there as well
- Embrace non-textual information and the power of pictures, moving images, sight, and sound

** Out Front with Stephen Abram: A Guide for Information Leaders, ALA, 2007*

Proposed Design: A Pathway...

- Out of the “box” you are in
- Into a transitional model that improves service now and repositions CA for future reference
- And toward an evidence-based package of services that serve Californians well into the future

Out of the Box

- ❑ Declining volume of CLSA reference questions
- ❑ Perception that “reference is dead”
- ❑ What to do about CLSA reference centers and staffing
- ❑ Virtual reference issues: staffing, quality assurance, questions of a local nature, technical problems, public appeal, cost benefit
- ❑ Database cost vs. use
- ❑ Leadership void re: web-based service development

Into A Transitional Model

- ❑ An improvement over what you have
- ❑ Establishes a platform for fashioning successive model iterations
- ❑ Repositions CA for an enterprise model in contrast to a static model
- ❑ Delivers service as well as planning and leadership
 - Data collection, analysis, benchmarking, needs assessment
 - Market research, applied research that would establish what would actually fill a niche
 - Customer-driven
- ❑ Finds that intersection of what you do really well and what the public wants and validates the data
- ❑ takes better advantage of the opportunities that are presented now and into the future

Toward An Evidenced-based Package Of Services

- ❑ Conduct ongoing market research
- ❑ Clearly define the niche
- ❑ Make data-driven choices
- ❑ Properly package those services that are viable
- ❑ Emphasize customer-centered outcomes
- ❑ Create tools that help the consumer be independent
- ❑ Consistently deliver professional work
- ❑ Make the information usable: customized, personalized, collaborative, with a feedback loop
- ❑ Include focus on high profile targets: e.g., child development, gang prevention, health & wellness

Model Components

- A single virtual Portal for CA public and CA librarian question “sessions” (e.g. CA Answers)
- A single CLSA reference service plan
- A manager/administrator for cadre of services (sessions, document delivery, product development)
- A designated leader or leader team to steer the development agenda

HOW TO GET THERE

- Start by analyzing whether state funding of reference (CLSA) could support the transitional model
- Think in terms of a 3-4 year time horizon
 - In ever-transitioning phases of development
 - CLSA, LSTA, and public/private/corporate funding partnerships
- Bring to bear the willingness, capacity, and ability to continue to morph into ever-relevant, evidenced-based new iterations of service.

The ability to morph is what protects the investment!

...AND WHAT LIES BEYOND

- Enterprise model – much more nimble
- Customer driven, Web 2.0 and beyond
- Recognizes libraries are but one part of the information equation
- Based on professional judgment not rigid procedures

TRANSITIONAL MODEL ESSENTIALS

■ Leadership

- Planning: data, assessment, benchmarking, Market research
- Coordination, integration, evaluation, reintegration
- Drive agenda for development; Development/Funding partnerships

■ Management

- The transition has to be managed
- Quality Assurance, Customer Care
- Marketing, publicity

■ R/D, innovation, experimentation, incubation

- Web-2.0 and beyond
- Project-centered
- Bring best practices and research to bear
- Local, national, international collaboration

■ “Reference” Services

- Customer sessions: question defining, coaching, guidance, answers, follow-up, follow-through
- Good customer service, accuracy, timeliness, cost-effectiveness
- Database support: databases and database help for customers; document delivery

■ Training

- Transcript analysis and feedback, accountability
- Desired outcomes to InfoPeople

“CA ANSWERS”

- Provide a Single Portal for CA Public and Librarian “sessions”
 - ❑ “California Answers” icon on CA libraries and State Library websites, etc.
 - ❑ Intake method = email, chat, IM, telephone, fax, other
 - ❑ Continue with OCLC QuestionPoint software for now
 - ❑ track developments, i.e., other vendors, products, experimentation with open source option
 - ❑ Refer questions needing more research to complex folder for 24 hour turn-around or according to client timeline
 - ❑ Coordinate protocol for questions requiring the collections of LAPL, San Diego, Fresno, San Francisco, etc.
 - ❑ Use “any and all means” to meet desired outcomes
- Desired Outcomes
 - ❑ Good customer service, accuracy, timeliness, customer care
 - ❑ The customer wants an answer not a lecture
 - ❑ Not making the customer feel dumb
- Use various staffing options to achieve the desired outcomes
 - ❑ Staff with CLSA Reference Personnel, virtually
 - ❑ Supplement with contract personnel, CA Libraries, commercial services, etc.
 - ❑ Use successful CLSA Reference practices: e.g., host relationships, subject and location stringers
 - ❑ Train and select personnel for the desired outcomes
 - ❑ Customer service skills, age-related skills, efficiency skills, content skills, referral skills
- Uses Selected databases (e.g. LAPL, other non duplicative)
 - ❑ Provide document delivery
 - ❑ Possibility of public databases with federated searching

HOW IT WOULD WORK AT THE START

- Public accesses *CA Answers* by telephone, fax, email, chat, instant messaging, etc.
- CA Librarians access is through the web Portal
- “Sessions” include clarifying, consulting, coaching, guiding, answering, referring, follow-up, follow-through
- Sessions with clients through the Portal are managed virtually with *QuestionPoint* software
- Staff resourcefully improvises
 - “Toolkit” includes option to use online services
 - Exercises professional judgment within an established framework
 - Established framework is under continuous improvement
- Complex questions handled by *CA Answers Follow-Up Team*
 - *Handled side-by-side with other questions*
 - *Uses resources of the LAPL, other libraries, stringers, commercial services*
- *CA Answers staff have access to First Source databases*
 - *Provide document delivery to client*

TRANSITIONAL “AGENDA”

- Better understanding/incorporation of user needs, preferences, and behaviors
- Quality improvement across-the-board
 - Evaluation, i.e., data, metrics, value for decision-making
 - Effective communication and relationship-building
 - Marketing and public relations
- Development in a Web 2.0 environment:
 - Interactivity, social networking
 - Diverse learning styles
- Service development priorities
 - Underserved, e.g. English language learners, print-impaired
 - Informed by customer input, market research

ORGANIZATIONAL STRUCTURE

- Consultant Leader or leader team
 - Change management
 - Planning/evaluation/research
 - Advocacy, development/funding partnerships
- External Sounding Board group
- State Library Contracts w/provider to Manage CA Answers (e.g., MCLS)
- CLSA Systems continue to pay Reference Center Personnel

HOW IT WOULD BE FUNDED

- Investigate using CLSA Reference allocations as the base of funding for the proposed model
- Use LSTA funds to enable the leadership and development agenda
- Use grants and partnerships to advance the development agenda
 - ❑ languages other than English
 - ❑ print-impaired
 - ❑ and other special needs

CURRENT FUNDING SNAPSHOT: POTENTIAL FOR REALLOCATION

| Summary: 2006/07 Reference Funding | | | | | |
|--|----------------------|--------------|------------|------------|-------------|
| | | CLSA | Local | LSTA | Grand Total |
| CLSA Reference: Personnel | | \$ 890,000 | | | |
| contract services, database subscriptions, other | | \$ 410,000 | | | |
| local funds for CLSA Reference | | | \$ 300,000 | | |
| First Source | LAPL databases | | | \$ 313,500 | |
| QuestionPoint/24/7 | software and network | | | \$ 200,000 | |
| Totals 2006/07 | | \$ 1,300,000 | \$ 300,000 | \$ 513,500 | \$2,113,500 |

- Right-size CA Answers staffing over time as appropriate
- Local contributions can continue to pay for regional databases, voluntarily contribute to local Web 2.0 services development, or be reclaimed by local libraries or some of each
- OCLC costs could be reduced and or redirected into “initial agenda” projects

WRAP-UP: OPPORTUNITY!

- Reference as we have practiced it may be dead, but the possibility of transforming it is very much alive.
- A new reference agenda could refocus and re-energize, take it to a new level
- The proposed approach leverages the long-term “gains” of the CLSA Reference Program
- Current reference staff can play a pivotal transitional role in transforming services
- All three service elements can be improved (next level reference, virtual reference, databases)
- CLSA funds may be repurposed to do this, along with other funding
- While moving ahead, the model/cost can continue to be examined, rethought, improved, morphed

PROJECT STATUS

- ❑ Remaining to be done by Consultant
 - April-May: Refine design
 - June: Final Design

Questions and Comments